

# Creating a Travel Authorization

## When to Create a Travel Authorization

1. For FOREIGN trips, authorizations are required in TREX for division approval and DOE approval.
2. For DOMESTIC trips, check your division's requirements regarding authorizations in TREX.
3. Once saved or submitted, use the **LBNL Trip #** for Carlson or Cliqbook
4. The system does not allow authorization for local travel.

Log in

1. Enter TREX in your browser's URL field
2. Enter LDAP UserID and password

## Create your Travel Authorization

1. Click on *Berkeley Lab Travel Expenses*.
2. Click on *Manage Trips*.
3. Select *Authorization—Create* in the *Action Request* field.
4. Enter data in required fields as shown in the screen shot.
5. Click on the *Go* button.

### Trip Navigation

### Trip Action and Key Information

Traveler (Last Name,First Name)  ID

**Key Information**

Action Request:

Begin Date:  End Date:

Trip Name:

Business Location (first):

6. In the next screen, select the business purpose for your trip.
7. Select *Foreign*, *Domestic* or *Local* in the *Trip Type* field.
8. Enter the statement of purpose for your trip here.
9. Click on *Next* to enter projects, locations and expense estimates.

### Expense Report - Create Trip Information

Traveler (Last Name,First Name) Pecoraro,Aurora ID 004123

**Trip Information**

\*Trip Name:  LBNL Trip #: 000060564

\*Business Purpose:  Travel Auth ID: 0000010233

\*Begin Date: 10/20/2007 \*End Date: 10/22/2007

\*Business Location (first): SACRAMENTO,CA

\*Trip Description and Business Benefit:

Trip Type: ☒ Domestic ☐ Foreign ☐ Local

10. At the top of the screen, enter one or more projects. To split projects, click on "+" to add additional projects.

Traveler Pecoraro,Aurora 004123 Phone 510/486-6439 Mail Stop 937R051

Arranger Atkinson,Maria Fink Phone 510/486-6184 Mail Stop 937R051

LBNL Trip # 000060564 Travel Auth ID Report ID 0000010233 Begin Date 10/20/2

Business Purpose Site Visit Trip Type Domestic

**Project Information**

Project	Primary	Percentage Split	Classification	Project Org	MARS Code
1 300704	<input checked="" type="checkbox"/>	50.00	YN0100000	CF	OPEXP
2 301011	<input type="checkbox"/>	50.00	YN0100000	CF	OPEXP

If more than one project, the percentage should total 100%, and a primary project must be selected.

11. Enter the departure city and the location to which you will return. You can enter the number of personal days.
  - For foreign trips the departure city is the airport city.
  - For domestic trips the departure can be the traveler's home, work, or airport location.
12. To add trip legs, enter the number of nights then click on "+" on the right. If you need to remove a leg, click on "-".
13. As shown below, per diems display based on business city location.
14. If you know actual estimated amounts for M&I and/or lodging, enter the daily amount in the *Actual* field.

Itinerary Legs									
Primary Information	Host Information	ITR	Departure Date	Departure City,State or City,Country	Arrival Date	Business City,State or City,Country	Number of Nights at Location	Number of Personal Days	Per Diem - M&I
1	10/20/2007		BERKELEY,CA	10/20/2007		SACRAMENTO,CA	2		59.00
2	10/22/2007		SACRAMENTO,CA	10/22/2007		BERKELEY,CA			59.00

15. If the actual lodging exceeds the per diem, scroll to the right and enter the justification.

Actual Lodging	Use Actual M&I?	Use Actual Lodging?	Comment for Lodging Overage		
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

16. For foreign trips, click on the *Host Information* and *Foreign* tabs to enter required information in all fields.
17. For Conferences, enter at least the conference name.

Itinerary Legs									
Primary Information	Host Information	Conference	Foreign	ITR	Departure Date	Departure City,State or City,Country	Arrival Date	Business City,State or City,Country	Number of Nights at Location
1	10/20/2007				BERKELEY,CA	10/20/2007		SACRAMENTO,CA	2
2	10/22/2007				SACRAMENTO,CA	10/22/2007		BERKELEY,CA	

18. At the bottom of the screen, enter estimated miscellaneous expenses in the *Misc* field.
19. In the *Total Air* field, enter your airfare estimate.
20. In the *Paid by Others* field, enter cost expected to be paid by a third party. This amount is only for information purposes.
21. Click *Update Estimated Costs* to display total estimated costs.

▼ Estimated Costs						
M&I	147.50	+ Lodging	222.00	+ Misc	<input type="text" value="Enter costs"/>	= Total Non-Air 369.50
Paid By Others (Informational Only)	<input type="text" value="optional"/>	<input type="button" value="Update Estimated Costs"/>			Total Air	<input type="text" value="Enter costs"/>
					Total Amount	369.50

22. For **Domestic trips**: You see two yellow buttons at the bottom of the screen.
23. Click on *Finish and Submit* to complete your authorization in TREX, otherwise save for later.

Save For Later

Finish and Submit

24. For **Foreign trips**: You see three yellow buttons at the bottom of the screen.
25. Click on the 2nd button to select the Approver.
26. Click on the third button to submit a Foreign Authorization for approval.

Save For Later

Select Approver

Submit for Approval